### 2. Purchase Request Change Order Screen (FM014)

The Purchase Request Change Order Screen (FM014) is used to modify or cancel an open, approved Purchase Request Document (FM030). Modifications can be made to an entire document or individual line item(s) within the FM030. Modifications may be made to increase or decrease the quantity or amount of the requisition, change the Accounting Code Classification Structure (ACCS) or cancel the requisition entirely

The FM014 is displayed below:

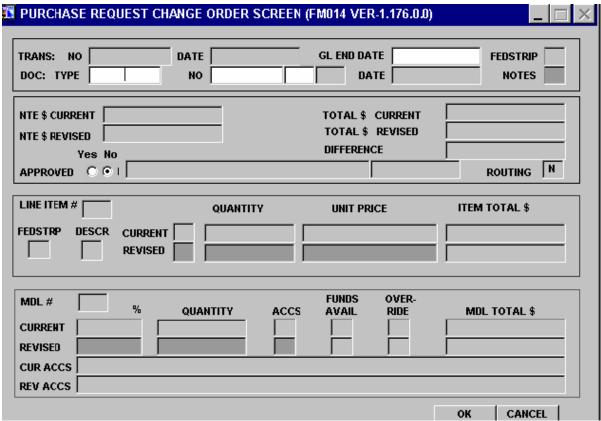


Figure 1 - FM014 Purchase Request Change Order Screen

# FM014 Control Block Field Description

TRANS: NO	DATE	GL END DATE	FEDSTRIP
DOC: TYPE	NO	DATE	NOTES

Figure 2 FM014 Control Block

Field Name	<u>Definition</u>	Attributes
Trans: No	This field displays the unique transaction number used to identify this Purchase Request change order transaction in CFS.	System- generated
Date	This field displays the date of the transaction.	System- generated
GL End Date	This field displays the general ledger period the Purchase Request change was entered.	Derived
FEDSTRIP <>	This field displays the information pertaining to FEDSTRIP transactions.	Optional. Pop-up window
Doc: Type	This field displays the document type of the original purchase request change document.	Required LOV available
Doc: No	This field displays the document number of the original purchase request change document.	Required LOV available
Date	This field displays the approval date of the transaction.	System-generated.
Notes <>	This field displays 240-characters used to record notes or comments pertaining to the on-line request change.	Optional Pop-up window

# FM014 Approval Block Field Description

NTE \$ CURRENT	TOTAL \$ CURRENT TOTAL \$ REVISED	
NTE \$ REVISED   Yes No	DIFFERENCE	
APPROVED C C I		ROUTING N

Figure 3 FM014 Approval Block

Field Name	<u>Definition</u>	Attributes
NTE \$ Current	This field displays the current not to exceed (NTE) amount - used for Blanket Purchase Agreements (BPA) documents.	Derived
Total \$ Current	This field displays the current total dollar amount of the original purchase request document.	Derived
NTE \$ Revised	This field displays the revised not to exceed (NTE) amount - used for Blanket Purchase Agreements (BPA) documents.	Derived
Total \$ Revised	This field displays the revised (modified) total dollar amount of the purchase request document.	Derived
Difference	This field displays the net change amount between the total of the original purchase request document and the total of this purchase request change.	Derived
Approved	This field indicates whether the purchase change request is approved for processing. Valid values are Y for Yes and N for No.	Required
Approval: Requester & Date:	This field indicates the purchase change requestor's name and date of approval or denial.	System- generated
Routing	This field indicates the approval routing of purchase change order request.	System- generated

## FM014 Line Item# Block Field Description

LINE ITEM	#		QUANTITY	UNIT PRICE	ITEM TOTAL \$
FEDSTRP	DESCR	CURRENT REVISED			

Figure 4 FM014 Line Item # Block

Field Name	<b>Definition</b>	<b>Attributes</b>
Line Item #	This field displays the item number.	Derived
Fedstrip <>	This field displays the current FEDSTRIP information pertaining to the item.	Derived Pop-up window
Current: Descr < >	This field displays the current description for the item.	Derived Pop-up window
Current: Quantity	This field displays the current quantity for the item.	Derived
Current: Unit Price	This field displays the current unit prices for the item.	Derived
Current: Item Total	This field displays the current total amount for the item.	Derived
Revised: Quantity	This field displays the new total quantity for the item.	Optional
Revised: Unit Price	This field displays the new total unit price for the item.	Derived
Revised: Item Total Amount	This field displays the revised amount for the item.	Derived

# FM014 Multiple Distribution Line (MDL) Field Description

MDL#	- % (	QUANTITY A	FUNDS	OVER- RIDE	MDL TOTAL \$
CURRENT					
REVISED					
CUR ACCS					
REV ACCS					

Figure 5 FM014 Multiple Distribution Line (MDL) Block

Field Name MDL #	Description This field displays the multiple account distribution (MDL) line number for the item account distribution.	Attributes Derived
Current: %	This field displays the current total percentage of the MDL to be charged to the item account classification.	Derived
Current: Quantity	This field displays the current quantity of the MDL that is charged to the item account classification.	Derived
Current: ACCS <>	This field displays the current account classification code (ACCS) that is identified with the MDL.	Derived
Current: Funds Avail	This field displays whether funds are currently available to commit.	Derived
Current: Override	This field displays whether funds override was required for the current detail item.	Derived
Current: MDL Total	This field displays the current total amount for the original item MDL.	Derived
Revised: %	This field displays new percentage of the MDL.	Required
Revised: Quantity	This field displays the new quantity of the MDL.	Required
Revised: ACCS <>	This field displays the new account classification code (ACCS).	Required
Revised: Funds Avail	This field displays whether funds are currently available to commit.	Derived
Revised: Override	This field displays whether the revised detail item requires funds override.	Derived

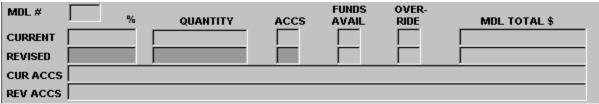


Figure 6 FM014 Multiple Distribution Line (MDL) Block Continued

**Revised:** This field displays the revised total amount for the Derived

*MDL Total* original item MDL.

Current: This field displays the current account classification code Derived

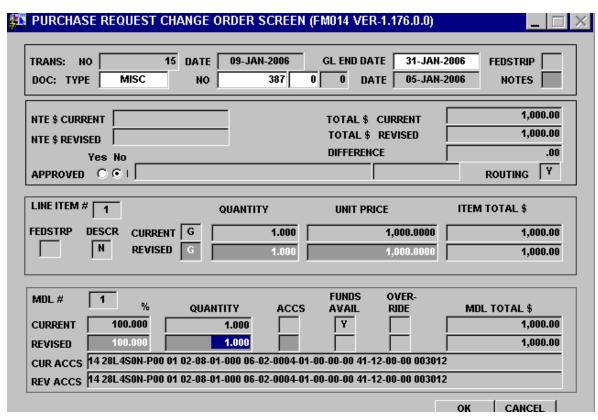
*ACCS* <> (ACCS) that is identified with the MDL.

**Revised:** This field displays the new account classification code Required

 $ACCS \iff (ACCS).$ 

#### **Entering a Purchase Request Change on the FM014:**

Perform the following steps in order to enter a Purchase Request Change:



Step	Action
1	Select the <b>Purchase Request Change/FM014</b> option from the Navigator Menu (Procurement, Transactions) and double click to display the screen.
2	Enter the requisition document type in the <b>Doc: Type</b> field or double click to select from the List of Values (LOV)
3	Tab or click to the <b>Doc: No</b> field. Enter the requisition number and 0 for the Release No or double click to select from the List of Values
4	Tab through the <b>G/L End Date</b> field and verify that the current General Ledger period appears
5	Tab or click into the <b>Revised</b> field in the Line Item block. For each Line Item on the Purchase Request, Enter to change the Quantity Amt. Or to change Unit price of the Purchase request as required.
6	Tab or click to the <b>Revised %</b> field to change the percentage distribution as required.
7	Tab or click to the <b>Revised Quantity</b> field to change to change the number of items

Step	Action
8	Tab or click to the ACCS field. Double click to enter the ACCS pop up and
	change the ACCS. Press the PREV button to save your changes and exit the
	ACCS pop up.
9	After reviewing your document, click into the <b>Approved</b> field and check <b>Y</b> .
	Press TAB or Enter to approve the FM014.
10	After approval the FM014 will be routed on the WF002 to the 2 <sup>nd</sup> level approver